

# Chapter Management

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# Council Effectiveness

- Leadership Continuity
- National Stipends
- National Chapter Effectiveness Program
  - LOE input
- Authority pertaining to Member Chapters
- Responsibility to Member Chapters

# Chapter Effectiveness

Legislative  
Advocacy

Impactful  
Community Service

Membership  
Growth

Chapter Health  
Recruiting and Retention

# Chapter Overview

## The healthy chapter:

- Articulable (and articulated!) chapter purpose/mission
- Legislative advocacy/engagement
- Impactful community service
- Membership growth

## How we can measure accomplishment and sustainability:

- Use of committee module/other electronic tools
- Up-to-date leadership roster
- Recruiting and retention statistics
- Use of sponsorship and grant programs
- National and Council engagement
- Training involvement and collaborative engagement

LOE!

# New Leader's Checklist

- Review the Policies and Procedures Guide in its entirety
- Familiarize yourself with the contents of the council and chapter page of the moaa.org website
- Be a national MOAA member (or the spouse of a national MOAA member)
- Be opted-in to receive communications from national MOAA, to include The MOAA Newsletter and C&C content
- Ensure the electronic roster is updated with new affiliate officers upon installation
- Ask for a New President's package from national MOAA if you haven't received one
- Watch the recordings of the last Leaders' Workshop, Roundtables and other leader training opportunities

# Affiliate Checklist- P1

- Have a stated and known mission
- Officer familiarity with the MOAA website and Policies and Procedures Guide
- Subscribe to *The MOAA Newsletter*
- Proactively address renewals
- Have a succession plan
- Regularly submit awards nominations
- Update Committee Module roster and check Near Real Time Report monthly

# Affiliate Checklist-P2

- Use existing technology/tools
- Publish a newsletter (print or electronic)
- Have a well-maintained website and social media presence
- Regularly engage with Council and national Council and Chapter Affairs
- Regularly attend offered training
- Engage in community service and advocacy activities
- Engage with other Military and Veteran Service Organizations//Coalitions/ Chamber of Commerce

# Chapter Mission Statement

**Develop** – Identify your purpose

**Articulate** – Listen; incorporate mission in responding to need of prospect

**Reiterate** – Include in your chapter marketing materials



# Grassroots Advocacy

Goal: Influence in every congressional district

- Legislative chair/liaison
- Coordinate Council and Chapter efforts
- Foster relationships with elected officials
- Visit legislators/staffers in home offices
- Participate in the State Legislative Forum
- Keep your chapter members informed and involved
  - Legislative Updates/Alerts in *The MOAA Newsletter* (weekly)
  - Legislative Action Center ([MOAA.quorum.us](http://MOAA.quorum.us))
  - Participate in annual advocacy events
- Join Virtual Chapter(s)



# Tools and Resources: Recruiting and Retention

## PROGRAMMING

- Electronic Messaging
- Post Cards/Revitalization
- Opt-in messages
- Visit request form
- Email draft on webpage

## RECOGNITION

- Leadership Awards
- Organizational Awards
- Ceremonies
- Military Officer Magazine and E-newsletter Member Spotlight

## OTHER

- Training Opportunities
- Discounts and Benefits

## TECHNOLOGY

- Committee Module
- Near Real Time Report
- Online Dues
- Recruitment Tracker

## OUTREACH

- Grants and Sponsorships
- Chapter Gear/Logos
- Videos
- RAD/Recruiting Kits
- Publications
- White Label Newsletter

# Recruiting Best Practices

- Every member is a recruiter
- Establish recruiting budget line
- Create internal recruiting competition
- Use Common Join Form
- Build a recruiting package (invitation letter, current newsletter, membership application)
- Always carry recruiting info
- Provide online join option, use online dues program
- Have a website or web presence
- Use social media
- Conduct meetings at different venues and times
- Connect with base retirement services office or transition center
- Strive for and earn recruiting and retention incentives and awards
- Utilize Sales Training techniques
- Follow up after initial contact and/or first meeting

**Why does the prospect want to join MOAA?**

**vs**

**Why did you join MOAA?**



# Information Sharing

- Association Management System Update
- Committee Module Enhancements
  - More Requested Data Fields
  - Near Real Time (NRT) Date Range Increase
  - Chapter Roster and NRT Match
- Expanded Member Data Sharing
  - Upon Request to Councils for Non-Commercial Use
  - Opt-in Joins Prior to October 2018
  - Restrictions and Safeguards

# Generational Recruiting and Retention

- Relevant, accessible programming
- Relatable, welcoming chapter members
- Younger generation wants to DO something; make a difference
- Consult with target demographic
- Former officers often join for camaraderie

# Inclusion and Retention

- Welcoming, diverse environment
- Integrate new members quickly
- First impression is key
- Sponsors for new members
- Survey chapter members
- Programming
- Current events, interests
- Mission
- Social



# Leadership Succession Tips

- Review present bylaws/fill critical positions first
- Review current term limits
- Consider “fleet up” model with a deep bench
- Generate interest in leadership positions well before nominations
- Identify potential candidates during normal course of business
- Groom and mentor potential leaders and get them involved in a chapter committee
- Be inclusive and proactive in including surviving spouse members and spouses
- Develop a chapter operations handbook
- Have an active awards/recognition program

# Revenue Generation

- Recruiting Incentives
- Community Grants and Sponsorships
- AMBA Advertising
- MOAA Vacations Rebate
- Newsletter Advertising
- Local Retail Sponsors
- Auctions
- Golf Tournaments



# MOAA STORE



0 items

ALL CATEGORIES



Search store



Apparel

Headwear

Drinkware

Accessories

Medal and Recognition

Meeting and Tradeshow

Councils & Chapters

Closeout

WELCOME TO THE  
**MOAA STORE!**

Member BENEFIT

BE SURE TO CHECK OUT THE CLOSEOUT SECTION FOR LAST CHANCE ITEMS!



# ROTC PROGRAM SUPPORT

## COUNCILS & CHAPTERS

PRICE RANGE

Min: \$0.00 Max: \$584.00

0 584


SIZE

All


COLOR


All

Sort by created on





Blank Program Certificates  
SKU: MOAA1152-MUL-OS  
**\$21.50**







Army Gold Bar Kit (w/OCP)  
SKU: MOAA1147-CO-MUL-OS  
**\$21.25**







Marine Corps Gold Bar Kit  
SKU: MOAA1146-CO-MUL-OS  
**\$14.50**








Navy Gold Bar Kit  
SKU: MOAA1145-CO-MUL-OS  
**\$14.50**



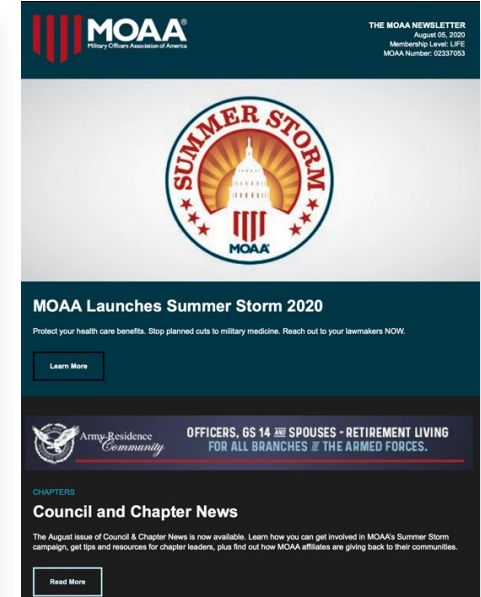
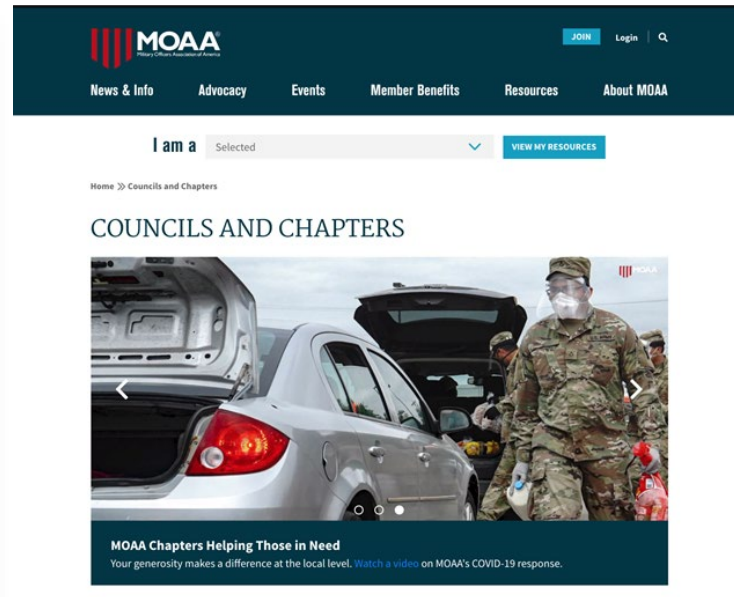








# Chapter Communications



- MOAA Electronic Newsletter
- White Label Newsletter
- Military Officer Magazine
  - Blow in cards
  - October Issue
- State-specific joint messages

- Electronic Support Messages
- Post Cards



# MOAA.ORG

## COUNCIL AND CHAPTER MEMBER PAGE

DP Workforce Now WorkLifeMatters Amazon Music Unli... moaa mail Hungry Harvest Rec... vanguard.com - per... VA My HealthVet voice mail MOAA - Home MOAA Perks

### Council and Chapter Awards

Learn about the many honors available to MOAA councils and chapters, and their members.

[READ MORE](#)

### Council and Chapter Recruiting and Membership

Resources for chapter leaders to grow and maintain their membership rolls.

[READ MORE](#)

### Council and Chapter Administration

Forms, links, downloads, and other materials.

[READ MORE](#)

### Council and Chapter Communications

Resources for chapter leaders to grow and maintain their membership rolls.

[READ MORE](#)

### Council and Chapter Community Involvement

Resources for chapter leaders to reach out to their communities.

[READ MORE](#)

### Council and Chapter Training Materials and Opportunities

Leaders and members alike have many learning tools at their disposal.

[READ MORE](#)

# RECURRING DATES OF INTEREST

<b>JAN</b>	Winter board of directors (BoD) meeting Florida Council of Chapters (CoC) Leadership Symposium, Orlando Virtual meeting and/or travel stipend paid to councils on request AMBA advertising program opens Jan. 1
<b>FEB</b>	Communications Awards deadline Feb. 1 Council and independent chapter presidents meeting Community Outreach Grant application deadline Feb. 28
<b>MAR</b>	MOAA Scholarship Fund application deadline March 1
<b>APR</b>	BoD meeting Advocacy in Action (AiA) Council Presidents Seminar (in conjunction with AiA) Regional Leaders Workshop, location varies
<b>MAY</b>	Council and independent chapter presidents meeting Levels of Excellence (LOE) Award application deadline May 1 Florida CoC convention, location varies AMBA advertising program ends May 31
<b>JUN</b>	BoD meeting
<b>JUL</b>	Surviving Spouse Liaison Excellence Award deadline July 1 Strobbridge Legislative Advocacy Award deadline July 1 Input due for October <i>Military Officer</i> magazine July 1
<b>AUG</b>	Council and independent chapter presidents meeting Regional Leaders Workshop, location varies
<b>SEP</b>	Regional Leaders Workshop, location varies
<b>OCT</b>	<i>Military Officer</i> magazine special chapters edition BoD meeting, annual meeting (with LOE presentations in even years)
<b>NOV</b>	Council and independent chapter presidents meeting Regional Leaders Workshop, location varies MOAA Scholarship Fund application period opens Nov. 1
<b>DEC</b>	Community Outreach Grant application period opens Dec. 1 Community Outreach sponsorship application period opens for next calendar year events (ongoing until funds are exhausted) Dec. 1

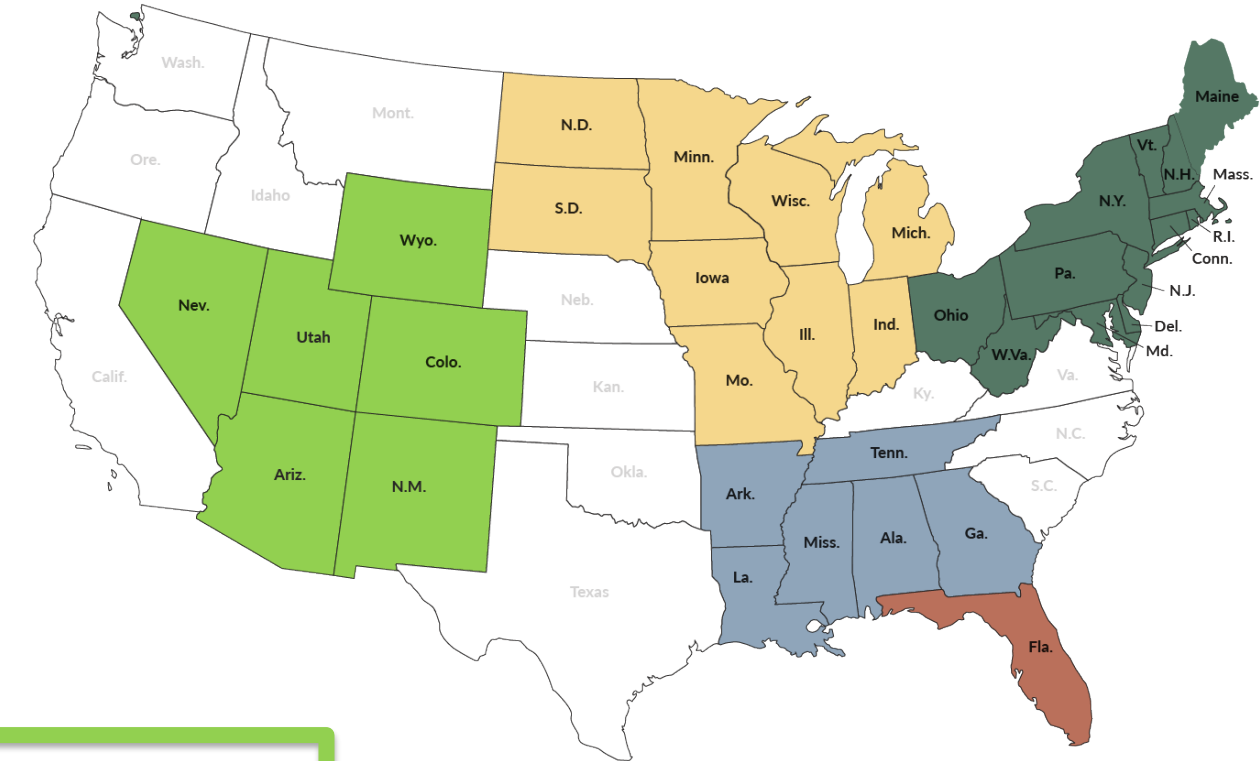
# 2023 Leader Training Workshops

**Leadership Seminar**  
**Orlando, FL**  
**January 6-7**  
FL, Other C&C by invitation

**Mid-South**  
**Birmingham, AL**  
**February 24-25**  
AL, AR, GA, LA, MS, TN

**North-East**  
**Providence, RI**  
**June 2-3**  
CT, DE, MA, MD, ME, NH,  
NJ, NY, OH, PA, RI, VT,

**North-Central**  
**Milwaukee, MN**  
**Sep 15-16**  
IA, IL, IN, MI, MN, MO, ND,  
SD, WI



**West**  
**TBD**  
**November 17-18**  
AZ, CO, NM, NV, UT, WY

# 2024 Leader Training Workshops

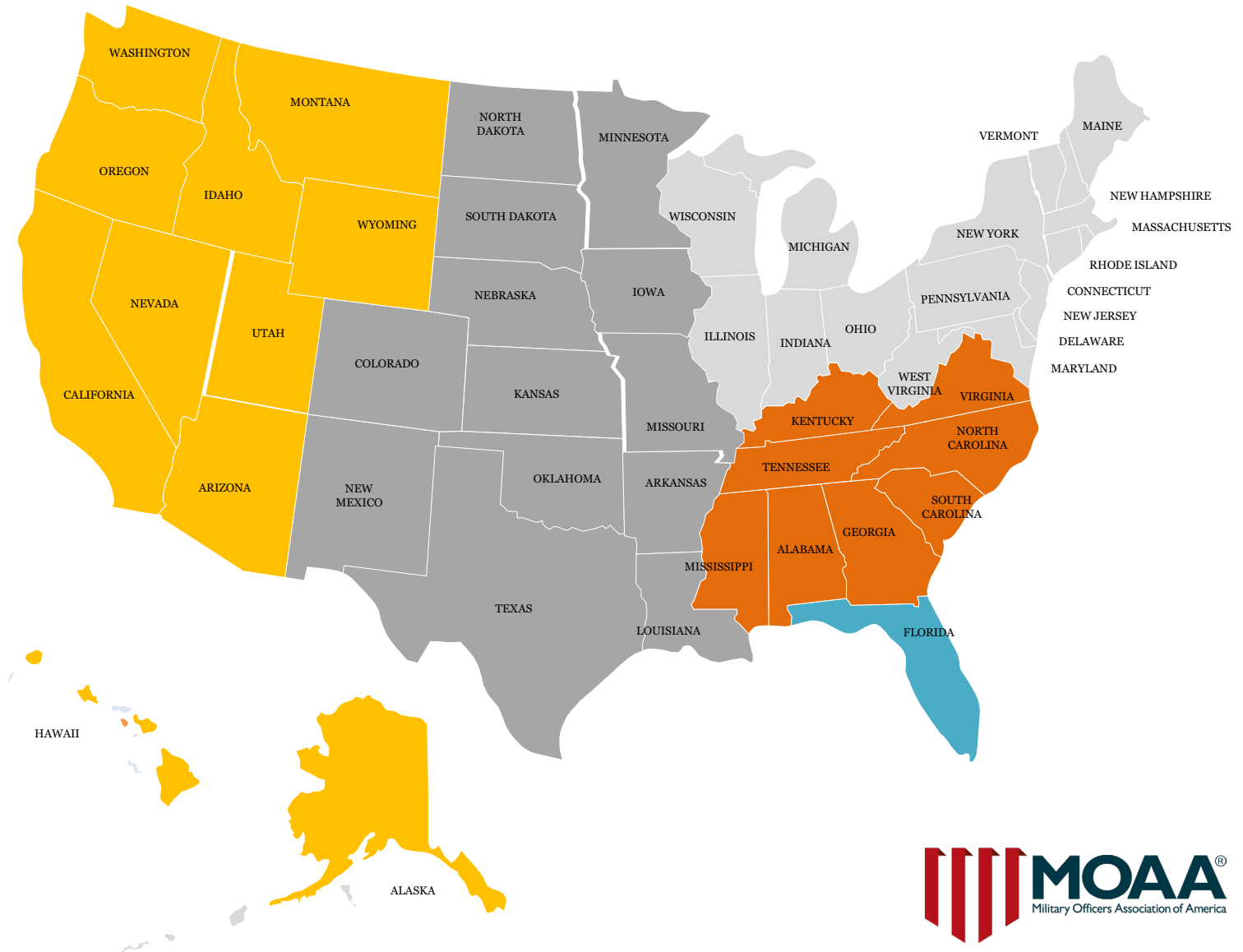
**Leadership Seminar**  
Orlando, FL  
January 25-27  
FL, Other C&C by invitation

**Virtual Workshop**  
New Leaders  
March 13-14  
Focus on New Chapter Leaders

**South Workshop**  
TBD  
May 10-11  
AL, GA, KY, MS, NC, SC, TN, VA

**Virtual Workshop**  
Experienced Leaders  
August 14-15  
Focused on Experienced Leaders

**West Workshop**  
TBD  
November 15-16  
AL, AZ, CA, HI, ID, MT, NV, OR,  
UT, WA, WY



# 2023 Roundtable Schedule

January 26 Generational Recruiting	February 23 Chapter Communications	March 30 Advocacy	April 20 <sup>*</sup> Committee Module
May 25 Awards	June 29 AMS Cutover	July 27 Chapter Assessments	August 31 Finance and Benefits
September 28 Legal Topics	Oct 26 Community Outreach	November 30 Recruiting & Retention	December 28 2023 review 2024 preview

Last Thursday of each month (\*exception), at 7:00 pm ET





# 2024 Roundtable Schedule

January 18 * Association Management System	February 29 Levels of Excellence	March 28 Advocacy in Action	April 25 Marketing
May 23 Awards Program	June 27 Compliance/ Legal Topics	July 25 Chapter Health Update	August 22 Council/Chapter Visit Program
September 26 Committee Module	Oct 24 Community Outreach	November 21 * Harris Communication Award	December 19 * 2024 review 2025 preview

\* Adjusted from 4<sup>th</sup> Thursday to Avoid Conflict

# Resources



- [www.moaa.org](http://www.moaa.org)
  - C&C Policies and Procedures Guide
  - Leaders Workbook
  - Webinars
  - Electronic Newsletter
- [chapters@moaa.org](mailto:chapters@moaa.org)
- 1-800-234-MOAA